

Commonwealth of Massachusetts
EOHHS VIRTUAL GATEWAY

MASSHEALTH
BUSINESS PROCESS:

COMMUNITY ELDERLY and THOSE
NEEDING SERVICES at HOME



July 2005



VIRTUAL GATEWAY

MassHealth Common Intake Process



COMMUNITY ELDERS and THOSE NEEDING SERVICES AT HOME

Beginning July 2005, the MassHealth Enrollment Centers will be accepting electronically submitted Senior Medical Benefit Request forms (SMBR) for applicants 65 and over not needing long-term care services (i.e.: residing in a nursing home) via the Virtual Gateway (VG). When the data entry is completed, the information pertinent to MassHealth is electronically transmitted to the appropriate MassHealth Enrollment Center based on the zip code of applicant. The information is imported into the existing MA21 system. The following is a description of the MassHealth Business Process that should be used to process the electronic forms.

Initiate the Application

Step 1: Please check REVS and the “**Search for MassHealth Applicant**” **Virtual Gateway** link to determine whether an applicant is known to MassHealth. If unknown to REVS and the “Search for MassHealth Applicant” function, proceed with the following steps.

Step 2: The applicant identifies which of the EOHHS programs the household wishes to apply for.

Please note: It is important to select all programs that the household is interested in at this point in the application process.

Step 3: The applicant must be given a **MassHealth Instruction Sheet and a shrink-wrapped MassHealth packet**. The online tool’s mandatory verification box indicating that the applicant has been given these resources should be checked off.

***Please note:** The Virtual Gateway cannot be used and a paper SMBR must be used as the application, if a Permission to Share Information (PSI) form is not completed and mailed to the MassHealth Enrollment Center responsible for the application.

Data Enter Applicant Information

Step 4: If there is an Eligibility Representative acting on behalf of the applicant, the **Assisting Person** data fields must be completed online and the ERD form must also be filled out, signed and the original sent, with the application number notated, to the MassHealth Enrollment Center responsible for the application.

Please note: For HIV applicants an ERD must be submitted in order to share notices and information.

Step 5: When determining MassHealth Family Groups, please include only one family group per application. A family group can be:

- An adult married couple where at least one is 65 or older
- An individual who is age 65 or older

Please note:

- When asking if an applicant is married, it is important, for age 65 or over populations, to ask, “Do you have a spouse living with you?”
- For 2 spouses living together in the community, where **either** or **both** are age 65 or older, file a Virtual Gateway application.
- For 2 spouses, where the applicant will be placed in a nursing home after hospitalization, file a paper **non**-Virtual Gateway Long-Term- Care application for the applicant. If the spouse who will remain in the community needs MassHealth, file a **separate** Virtual Gateway electronic application for the spouse. Please ensure that the information on each application, paper and VG, contains information for **both** spouses.

When identifying relationships, please use the familial designations. Do **not** use *In Care Of* as a relationship. All family eligibility notices will be sent to the person who is designated as *Head of Household*. The persons listed must be the applicant or spouse, not the children, conservator or contact person, etc.

Notices will go out to both applicant and spouse.

Step 6: Name, Gender, Date of Birth, Address and Relationship are mandatory fields. These fields must be completed in order to proceed with the online application.

Here is a list of required information, which must be included and verified before eligibility determination can be made. This list includes, but is not limited to:

- Income (Examples)
 - Pensions
 - Annuities
 - Social Security

- Veterans Benefits
- Rental Income
 - Certain deductions from rental income are required, as part of eligibility process and applicant will receive a notice relative to specific information that will need to be sent in.
- Employment Income
 - Please check pay stubs for biweekly or weekly, gross income, not net, including tips for waitressing, etc.
- Assets (Examples)
 - Bank accounts
 - Please remind applicants that checking accounts are considered bank accounts
 - Burial accounts
 - Cash Surrender Value of Life Insurance
 - IRA's
 - Stocks
 - Bonds
 - Securities
 - Real estate other than primary residence
 - Trusts
 - Vehicles if more than 1
 - Interest in a Life Estate
- Health Insurance
- Immigration status
- MassHealth **does not need** Massachusetts licenses, utility bills, and self-declared statements of income, when MassHealth has received pay stubs

Finalizing the Process

Step 7: After the data entry is completed, the Electronic Application Summary is printed and given to the applicant for review.

Step 8: The Electronic Signature Page and PSI are printed after the summary. Applicant(s) (every applying adult 18 years of age or older in the household) must sign and date the signature page and PSI. These forms are retained for submission **by mail** to the MassHealth Enrollment Center responsible for the applicant.

Step 9: The online tool's check off box is checked indicating that the information has been reviewed and signed by the applicant(s). The following original documents are mailed to the appropriate MassHealth Enrollment Center in three business days—

- The VG cover sheet
- The original Electronic Application Signature page
- The original PSI
- If applicable:
 - Original ERD
 - DDU Supplement

MEC Addresses

Revere: 300 Ocean Avenue, Suite 4000, Revere, MA 02151
Springfield: 333 Bridge Street, Springfield, MA 01103
Taunton: 21 Spring Street, Suite 4, Taunton, MA 02780-0711
Tewksbury: 367 East Street, Tewksbury, MA 01876-1957

Please send:
 "Attention: CIT
 Team"

Step 10: A "next steps" document, which provides additional information regarding the application, a verification listing and the types of documents the applicant may submit for verifications, is printed for the applicant.

Faxing Verifications

Within three business days of the online submission, verifications should be faxed to the appropriate MEC. **If verifications required to be sent to the MEC are mistakenly sent to the CPU, case processing will be delayed.**

MEC Fax Numbers

Revere: (781) 485-3405
Springfield: (413) 785-4180
Taunton: (508) 828-4611
Tewksbury: (978) 863-9217

Please send:
 "Attention: CIT
 Team"

After three business days, they should still be sent to the appropriate MEC, and applicant will most likely receive a Verification Checklist. The Application Number, Head of Household Name and Social Security Number, if available, should be included on all correspondence, including all faxed documents.

Please note: The original signature pages, ERDs and Disability Determinations must be mailed as originals. Faxed copies are not acceptable.

Making Data Changes after Submission

If a data change has to be made, fax the Change Form cover sheet along with the change(s) to the appropriate MEC. The Application Number, Head of Household Name and Social Security Number, if available, should be included on all correspondence, including all faxed documents.